



WESTCOAST CLOUD



DYNAMICS 365 CUSTOMER SERVICE LICENSING

Customer Service gives businesses the power to create closer relationships with their clients. It streamlines support processes, enabling customer-facing employees to offer better experiences, and end users to quickly find answers to their own issues.

Customer Service is available as either an Enterprise or Professional user license. Your customers can have both, but only if they're deployed in separate environments. Customer Service Enterprise may also be licensed by device.

Plus, Customer Service can be personalised with optional add-ins to deliver the capabilities your clients need.



Dynamics 365 Customer Service Professional

Customer Service Professional gives service agents the information and tools they need to proactively solve customer queries. It also includes a self-service customer portal and access to a knowledge hub for end customers. It's designed for small to medium-sized businesses with less complex environments.

Dynamics 365 Customer Service Enterprise

Customer Service Enterprise gives users everything offered in Professional, as well as some additional functionality. Users can schedule and dispatch services, create teams, and manage resources through other integrated Dynamics 365 applications.

Customer Service Enterprise licences comes with 2,000 Customer Voice responses/tenant/month. Additional response packs (in packs of 1,000 responses/tenant/month) can be purchased as needed.

Customer Service Enterprise capacities

- Application/Capacity
- Customer Service Enterprise
 - Record routing
- Included Capacity
 - 50 records/user/month (pooled at the tenant level)
- Add-On Capacity
 - Unified routing add-on:
 - 10k records/tenant/month (pooled at tenant level; excluding Chat and Digital Messaging conversation record)

CUSTOMER SERVICE USE RIGHTS

USE RIGHTS	CUSTOMER SERVICE		
	TEAM MEMBERS	PRO	ENT
Access			
Dynamics 365 for Outlook and Dynamics 365 App for Outlook	•	•	•
Dynamics 365 Mobile Client Application	•	•	•
Microsoft Dynamics 365 for iPad & Windows	•	•	•
Microsoft Dynamics 365 Web application	•	•	•
Read			
All Dynamics 365 application data	•	•	•
Custom table data	•	•	•
Tables: Create, Update, Delete			
Accounts		•	•
Activities	•	•	•
Announcements	•	•	•
Calendar: Share	•	•	•
Case/Incident		•	•
Contacts	•	•	•
Custom tables	15 max	15 max	•
Embedded Intelligence			•
Entitlements		•	•
Facilities/Equipment			•
Leads (Create Only)		•	•
Notes	•	•	•
Personal Views	•	•	•
Product		•	•
Product Families/Hierarchies			•
Product Relationships			•
Resources		•	•
Saved Views	•	•	•
Service (Service Scheduling)			•
Work Hours		•	•
Tables: Actions			
Activity Feeds: Post & follow activity feeds	•	•	•
Activity: Convert to a case		•	•
Add or remove a connection (stakeholder, sales team) for an account or contact	•	•	•
Business Units: define and configure			•
Case Management: reassign, add to queue, route, and resolve cases		•	•
Chat with support team (as chat client for self-service; requires third-party solution)	•	•	•
Dialog: start dialog	•	•	•
Knowledge Base: create, update, publish, configure		•	•
Mail Merge: perform mail merge	•	•	•
Marketing List: associate a marketing list with an account or contact	•	•	•
Open Project Position: apply for an open project position for Project Operations	•	•	•
Project Tasks: update the project tasks status for Project Operations	•	•	•
Queue: use a queue item	•	•	•
Resource Competencies: update own resource competencies for Project Operations	•	•	•
Resources (facilities, equipment, people): manage			•
Schedule and Dispatch Capabilities: use scheduling assistant, drag & drop assignment, update resource bookings			•
Schedule Board: configure and view			•
SLA: manage		•	•
Teams: define and configure			•
Work Hours: manage			•
Yammer: use Yammer collaboration (requires the appropriate license; acquired separately)	•	•	•
General System Use: Actions			
Auditing: configure		•	•
Business Processes: customise		5 max	•
Create and update custom reports, charts, and dashboards		5 max	•
Customize and extend out of the box reports, charts, and dashboards			•
Dialogs: define and configure		•	•
Duplicate Detection: configure rules		•	•
Dynamics 365 Forms, Tables, and Fields: create		•	•
Email: create, update, and delete templates	•	•	•
Forms and Views: customise		2 max	•
Import Data in Bulk		•	•
Microsoft Excel: export data to Excel	•	•	•
Queue: define and configure		15 max	•
Records: use relationships and connections between records	•	•	•
Search and Advanced Find: use	•	•	•
Tables: define connections and relationships between tables		•	•
Word: create, update, and delete templates	•	•	•
Workflows: define and configure		•	•
Additional Services and Software			
Customer Service Hub		•	•
Dynamics 365 Customer Voice			•
Dynamics 365 Mobile Offline Capabilities			•
Project Operations Team Members App	•	•	•
Unified Service Desk (USD) for Microsoft Dynamics 365			•



ADDITIONAL ENTERPRISE FEATURES

Unified Routing

Unified Routing is a new feature in Customer Service. Using AI and machine learning, it automatically classifies incoming work and decides which agent to send it to, based on availability, capacity or specialisation.

Routing records, excluding Chat and Digital Messaging conversation records, are subject to a licensed capacity. Customer Service Enterprise includes unified routing with 50 record routes per user per month.

Customer Service Insights

Customer Service Insights gives your customers the analytics and AI capabilities they need to better understand how they're engaging with their customers and stay ahead of emerging customer trends.

It also shows businesses how they can improve their support systems, by tracking performance support service and agent performance.

If you have any questions around licensing, please contact:

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